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What role for cars in tomorrow's world?



OPINION SURVEY JUNE 2017

*There is no desire more natural
the desire of knowledge*

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OPINION SURVEY ON CARS AND THEIR USES

The Montaigne Institute has organised an opinion survey on the habits and expectations of citizens regarding mobility and the future of cars in order to inform its discussions on cars and their uses. This survey was carried out in December 2016 by Kantar-TNS, interviewing 3,000 people. The study focused on three geographic areas: France, Germany and California.

What lessons can be drawn from this survey?

What is the relationship between respondents and cars?

The driving licence is not outdated. In the three geographic areas studied, **more than 9 out of 10 respondents had a driving licence.** Among the 18-24 age group, 83.9% French, 80.1% Germans and 85.1% Californians had their licence.

France mostly has diesel cars, while almost 70% of Germans and 85% of Californians favour the petrol engine.

The survey reveals that the geographic characteristics of the three areas considered have a strong impact on the means of transport that are privileged, in particular in California, where people use cars, planes and trains more frequently, because of the longer distances involved. Seven out of ten Californians use the car to commute from home to work, compared with 64.4% of the French. Those who do not use the car every day in France (47.6%) and in Germany (49.2%) make the most of the shorter distances to travel by foot or bicycle.

They are also more likely to use public transport networks, which are more developed.

However, in all three areas, more than half of those interviewed use their personal car at least once a day, making this the most used means of transport. The real geographic difference lies within each area, as daily use of the car declines with the size of the city. However, even in large cities, this daily use remains significant, concerning an average 35% of those living in the urban centres of the major metropolises,¹ compared with 24% using public transport. In France, the figures are 23% (daily use of the car) and 31% (daily use of public transport). It is interesting to note the differences between those living in urban centres and those in the outskirts of the same cities: daily car use is 15 points higher for the latter, while the use of public transport remains similar to that of the former.

What is the relationship between respondents and today's cars?

More than half of the people interviewed use their personal car at least once a day, making it the most used means of transport. This tendency does not seem to slow down: in the three areas studied, **99% of car owners have no intention of getting rid of their vehicle** (they either intend to keep it or replace it). This unanimous response can be explained by the image associated with cars: **for more than one in two people interviewed, cars represent freedom and independence.** The negative aspects related to car ownership (environmental pollution, constraint) are only rarely mentioned by respondents,

¹ Understood here to be agglomerations with more than 1.5 million inhabitants.

although one every five people consider the car to be expensive.

Cars therefore remain the privileged means of transport, appreciated by the respondents in all three regions. The car is recognised for its **practicality** (by Europeans) and **comfort** (by Californians). Furthermore, when compared with other means of locomotion, the respondents from all three geographic areas surveyed mentioned **flexibility** one of cars' major assets followed by the practical aspect of cars for the French, comfort for the Germans and speed for the Californians.

Those who do not travel by car have other priorities:

- walking or cycling are privileged because they are healthy;
- public transport is seen as being both practical and inexpensive;
- the train is preferred for its speed and the pleasure associated with its use.

Despite their growth, new forms of mobility (car-sharing, car-pooling, private car rental, etc.) are still only **very partially used**. In France, daily use generally does not exceed 6% of the individuals concerned, regardless of the geographic area concerned.² Those who use them, generally do so instead of personal cars, but also to replace train journeys (with long distance car-pooling), public transport or walking (with car-sharing or private hire vehicles).

² In agglomerations of between 500,000 and 1.5 million inhabitants, this daily use is highest; for the French population as a whole, the rate is 2%. Occasional use of the new forms of mobility concerns more people, with 36% of the French using them over the twelve months preceding the survey.

What do respondents expect from the car of the future?

When asked about the car of the future that would best suit their needs, the French and Germans mention the **respect of the environment** as their main criterion, while Californians are more sensitive to safety. Finally, only 16.4% of the French, 15% of Germans and 22.3% of Californians consider that among all cars, the autonomous car would best suit their needs, as its potential promises are welcomed with scepticism. When asked “To what extent would such a vehicle meet your mobility needs?”, as many people responded positively (“extremely well”, “very well”) as negatively (“not very well”, “not at all”).

Paradoxically, **almost two thirds of the people interviewed have an overall positive opinion** of the autonomous car (63.3% for the French, 64.4% for Californians and 54.5 for the Germans). Furthermore, an almost consensual opinion is expressed regarding the capacity of the autonomous car to facilitate travels for people suffering from reduced mobility (more than 4 out of 5 respondents). An autonomous car would also reduce **the time wasted by the search of a parking space**, according to 80.3% of the French. It would allow for longer journeys without being tired for 71.9% of Germans and 79.9% of Californians.

So why such lack of enthusiasm for this new technology?

Firstly, the respondents have doubts regarding the price the autonomous car will have when it reaches the market: **45.8% of the French, 43.1% of Germans and 40.3% of Californians take this to be its main disadvantage.**

Respondents are equally very hesitant regarding the protection of their personal data: the fear of seeing this data misused or hacked is mentioned by 27% of Californians and 33% of Germans. However, even if the price was acceptable, 31.6% of the French, 31.5% of Germans and 33.1% of Californians do not know whether they would buy such a car.

It therefore seems unlikely that these technologies will spread quickly in the short term. To improve this disheartening prospect, public authorities will have to be proactive in **encouraging innovation in the car industry** and paying particular attention to its presentation and promotion to the population.

Method:

The survey was conducted through online interviews, from the 14th to the 27th of December 2016, among 1,006 French, 1,004 Germans and 983 Californians, i.e. at total of 2,993 people representative of the populations in the geographic areas.

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What role for cars in tomorrow's world?

Faced with the issues surrounding the use of cars in our societies, public authorities tend to adopt hardlining, even constraining, policies for drivers.

However, according to a survey carried out for the Montaigne Institute by Kantar-TNS Sofres, most French people still have affection for cars and consider them to be an everyday necessity. Despite being conscious of its environmental impact, citizens remain very attached to this means of transportation. How can we conciliate this preference and this environmental requirement?

In order to respond to the societal, environmental and economical challenges the car industry is confronted to, the Montaigne Institute has formulated ten concrete proposals, which rely on incentivizing measures, on the invitation to experiment, and on the cooperation between the stakeholders of tomorrow's mobility.

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